Member Recruitment & Retention
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Topics to be covered

1 How to get new members
2 Tips for retaining current members
3 The database: a vital tool
4 Importance of processes and systems

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1 Membership recruitment context

1. People join associations by free choice
2. Having to be a compulsory member is registration
3. People and organisations join because:
   - They support the cause generally
   - They seek the offerings of the association
4. If you are a fortunate association, leads will develop by nature of your cause (eg medical specialists)
5. Do members join as individuals or on behalf of their organisation?
6. Know why people join – and why they do not renew

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Membership recruitment cycle

1. Association name is the starting point: have a clear name
2. Leads become prospects
3. One shared Database as the repository of information
4. Capture leads on your database and cultivate them over time
5. Prospects come members
6. Once they are members, ensure that you retain them

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Membership recruitment campaigns

1. Stages
   - Existence
   - Public Relations eg story in newspaper (broad)
   - Marketing (targeted)
   - Sales (specific)
2. Word-of-mouth recommendations and testimonials
3. Member-get-member campaign

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Marketing and sales

1. Is your Mission and are your Benefits clear?
2. Brand = Mission + Benefits + Reputation
3. Marketing is mainly email direct marketing
4. Identify sources of leads:
   - word-of-mouth
   - Association websites
   - events
   - direct email/direct mail campaigns
5. Don't be scared by term "sales" & telemarketing
6. Although sales can be soft not hard, sales requires training, systems, procedures

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Membership targets

1. Recruitment strategies need a plan and budget
2. Project = to compare:
   - Membership Potential
   - Actuals
   - Self-Assessment Rating
   - Target
3. In other words:
   - How many potential members do we have? Eg 1,000
   - How many members do we have? Eg 330
   - What % mark would we give our recruitment efforts? Eg 50%
   - Therefore if we had a 100% effective recruitment effort, we would have 660 members.

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Pricing & applications

1. Charge what you are worth!
2. If you charge less than expensive dinner out for two or airline ticket, you may be seen as worthless
3. Some associations charge so little it is hardly worth depositing the cheque
4. Do not change a joining fee: more likely, give people a discount to to join for the first year
5. Get applicants for membership to pay along with their application
6. Only process the credit card or bank the cheque if the application is accepted
7. Have a swift turnaround from receiving an application: don't wait 3 months until the next Committee meeting!
8. Don't offer free membership or paid life membership

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Is investment in getting more members worthwhile?

1. Higher membership fees x many members = considerable income
2. Remember:
   - Members will be purchasers of the activities that your association runs
   - Members are a future income stream
3. Ask whether investment in growing membership, such as buying an online database combined with a website or employing a Membership Officer, will be a worthwhile investment

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Emotions

1. Utilise – but don't over do – emotional reasons for joining
2. Accept that some people are "joiners" and others are not
3. Respect that some people don't want to join: don't harass them, but do record their disinterest on the database
4. Some people have large ego's: get them involved but establish term limits on Presidents so it's not a job-for-life
5. Some people do well financially: be a scholarships vehicle or start Deductible Gift Recipient (DGR) foundation
6. Have aspirational appeal
7. Look like winners ("eg Sold Out") and never be desperate!

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Membership standards

1. Set standards with the criteria you expect for membership
2. Make them sign a form saying they will observe the "Constitution and Rules" of the association
3. Don't get them to seek proposer and seconder when applying
4. Have internal promotion to higher levels of membership or service recognition awards
5. Set relatively easy standards for joining, then have higher "aspirational" standards

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Association benchmarking

1. *Previous project :*
   - *Membership Potential*
   - *Actuals*
   - *Self-Assessment Rating*
   - *Target*
2. Equity of the association: what it is worth in PHP's
3. Membership fees
4. Number of genuinely active volunteers

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Questions

1. *What are your association's current membership numbers and what would you realistically like them to be? (done)*
2. Which specific staff or volunteer position is tasked with increasing membership?
3. What database does your association use to record contact details of members and potential members?
4. What are your current annual membership fees?
5. What are the key services that members receive that make them join your association and renew?

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2 Retaining members

1. Now we have members, let's keep them!
2. It is easier (and cheaper) to retain a member than recruit a new one
3. People or organisations that do not renew may return at a later stage
4. People will more likely rejoin than join if they like your association, even if the real advantages are marginal
5. Use realistic internal self-assessment to consider whether members get value for money from membership
6. Consider whether your not-for-profit suits annual set date renewals or anniversary renewals
7. Amend, improve and refine the association's Mission and Goals if appropriate to what members need – but not to lose focus and purpose

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Multiple points of contact

1. Multiple instances of positive contact are helpful
   - events
   - social
   - email
   - printed newsletters
   - phone calls
   - services
   - discounts
   - networking
2. Visits are helpful if they can be afforded

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But don't harass or annoy members

1. Ask your members "would you like us to email you weekly, monthly or quarterly?"
2. Have a communications plan – what information gets sent to what people at what time
3. Occasionally send personalised emails
4. Have a password-protected website with information unavailable to non-members
5. Impress them with your customer service!

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Stages in retaining members

Retention starts 1 month after joining/renewing, not 1 month before renewal is due!

1. Renewal advance notice
2. Official renewal documentation
3. Friendly reminder
4. Formal reminder
5. Telephone 1
6. Telephone 2
7. Letter of discontinuation of membership
8. Amended status on database (don't treat them the same if they don't pay to renew)
9. PLUS future follow up

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Processes for Membership retention

1. Need for the membership offering to be delivered
2. Have a database that tracks all participation and interaction
3. Personal attention and customer service
4. Appeal to Generation X, Y and Z
5. Have processes to follow up!

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Surveying members regarding their needs and satisfaction

1. *Perpetual challenge to be a "must-join" association*
2. Associations must know what their customers want
3. And associations must know get feedback on the experience
4. More senior members on Boards can lose touch
5. Is the association providing:
   1. Relevant services?
   2. Timely services?
6. Consider online surveying site, eg surveymonkey.com
7. *This is all to become a must-join and must-renew organisation*

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"What's in it for me?"

1. Give members the services they want and charge them for most services
2. Occasionally have a free-and-exclusive-to-members event
3. Typical services that will appeal are:
   - Events
   - Social interaction
   - Communications and information
   - Community good work
   - Advocacy
   - Community leadership

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Specialisations and selectiveness

1. Members and potential members can be segmented and activities can be developed for them
2. "Special Interest Groups" self-run under the auspices of the association can be very popular
3. By age, hobby, stage in life, sports, business
4. It is OK to have some "selective" events as long as these are not discriminatory
5. Reward and acknowledge loyalty and long-term membership

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3 Database as the vital tool

1. Databases must be technologically quick and available to all staff
2. They should be simple to use and intuitive - yet still require training and documentation
3. Culture of using the database is paramount (including CEO)
4. Databases are best if they are able to be expanded and enhanced relatively easily and simply
5. The basic architecture and linkages are fundamental
6. Reports must be available readily, flexibly and easily

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Typical fields in Database

1. Information on the INDIVIDUAL
2. Information on the ORGANISATION - linked to the individual
3. ADDRESSES
4. EVENTS AND REGISTATIONS
5. CUSTOMER RELATIONSHIP MANAGEMENT (CRM)
6. FINANCES (usually more difficult)
7. Website access to own information if possible

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Database options

1. Word documents and Excel spreadsheets are not databases
2. Online databases and websites may not be necessary but they are useful
3. Lower technology and internet costs means quality databases and database/websites are available, accessible and affordable

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4 Importance of Processes & Systems

1. Recruitment & retention is more of a science than an art
2. Much work is required on the processes and systems - but this work will pay off
3. Understand the costs of recruitment and renewal - and financial implications of not doing them well
4. Small or large association, there is no excuse to not be organised
5. All the systems and processes must be documented!
6. And (once again) have a good database

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Allocation of staff to tasks

1. Know who is responsible: have an organisation chart
2. Assess the skills required for different tasks and have the right people doing them
3. In an ideal world, associations will be able to afford staff
4. In many member organisations, it is likely to be volunteers
5. Some people have personalities that are accustomed to sales – and they are poor at the paperwork and follow up
6. Some people have personalities that are accustomed to paperwork and follow up - and they are poor at sales

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Don't accept that volunteers "too busy"

1. Associations have the challenge of slack volunteers that don't do what they said they would do
2. Have a culture of understanding this - whilst moving people on from voluntary portfolios when they don't deliver
3. Volunteer Committees/Boards with no paid staff need to have two styles of meetings
   - Governance meetings to discuss strategy and overall outcomes
   - "Unpaid staff" meetings to decide who-does-what and when it is due

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Closing comments

1. Association name must be descriptive: it is marketing in itself
2. Reputation is paramount: word of mouth will be your best marketing
3. Have systems, processes and clear responsibilities for staff
4. Database including both members and prospects is vital
5. Be positive, confident, organised ☺

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Levels of AF Membership

1. Journal and eNews
2. Free events and member event discounts
3. Benchmarking surveys
4. Policy and advocacy
5. Member advice helpline
6. Local and international networks
7. Board and staff training (Silver and Gold)
8. Governance and constitution review (Silver and Gold)
9. Financial benchmarking (Gold)
10. Strategic planning discount (Gold)

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Thank you!

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